

2023 Tax Questionnaire

Enter Full Name / Date of Birth (DOB) / Occupation and contact information:

Taxpayer: _____		DOB: ____/____/____	Occupation: _____
Spouse: _____		DOB: ____/____/____	Occupation: _____
Phone # _____	Email (1) _____	Email (2) _____	
Dependent(s) - List any NEW Dependent - or any other changes in dependents that have occurred in past year			
Full Name	Social Security #	Date of Birth	Relationship to Taxpayer

Check YES or NO below for each - (if yes, explain or provide requested information - Attach additional sheets if needed.

Y N In 2023 did you ? (and/or your spouse):

1. > Move to a new home ? **If yes**, enter Date Moved ____/____/____ and list your new home address below : _____
2. > Hold any interest in any financial account located **Outside of the United States of America** ?
3. > Have **Health coverage** ? (including your spouse, and all dependents *if any*)
4. > Own any **digital currency** such as Bitcoin / Dogecoin or other?
5. > Renew your Driver's License? **If yes**, send a copy of the Front & Back of the new license(s).
6. > Pay for **Childcare** in 2023? **If yes**, complete the additional information requested on Back
7. > Pay any **student loan interest**? **If yes**, include a copy of **Form 1098-E** for each student.
8. > Pay **Tuition** for anyone attending college? **If yes**, include a copy of **Form 1098-T** and list any amounts paid for **Books** for each Student: _____
9. > Make any **Monetary \$ donations** which you have a receipt for ? **If yes**, enter requested information on Back
10. > Make any **non-monetary** (clothes, furniture, etc.) donations to a charity which you have a receipt for?
If yes, and the total value of items donated was under \$500 enter the total value here: \$ _____
If yes, and total value was over \$500 complete the additional information area on Back
11. > Have **job-related** expenses that were not reimbursed by your employer ? (**Teachers include classroom supplies**)
If yes, list expenses in the additional information area on Back
12. > Pay any **Sales Tax** on large items ? (Large Appliances / Car / Boat / Furniture)
If yes, list each item and amount paid for each: _____
13. > Pay **Rent** or **Property Tax** in 2023? **If yes** list amount paid \$ _____ [] **Rent** [] **Property Tax**
14. > Receive **Unemployment** payments in 2023? **If yes**, include a copy of form **1099-G**.
15. > Contribute any money to a **529 College Savings plan**? **If yes**, include the end of year statement.
16. > Contribute any money to an **IRA** (outside of your employer plan)? **If yes**, include the end of year statement.
17. > Pay for **medical expenses** out of pocket? **If yes** enter in "other changes" on back or attach a list.
18. > Make any **Estimated Tax payments** in 2023? **If yes**, enter amounts and dates in area on Back
19. > Make any **Energy-Efficient improvements** to your main home in 2023? (New Furnace / Central AC / Hot water Heater / Windows / Doors) if yes list item and cost of each: _____

Send this SIGNED completed form with your Tax Documents – include all W2 forms / 1099 interest & Dividend statements 1099B sale of stocks / 1098 Mortgage statement / 1099NEC / 1099Misc and all other income Statements.

PLEASE SIGN X _____

ADDITIONAL INFORMATION ON BACK

2023 TAX QUESTIONNAIRE ADDITIONAL INFORMATION

- Attach a separate sheet if additional space is needed -

(6) List **CHILDCARE EXPENSES** below- All information is required to qualify for the credit -

Childs Name	Name of Provider	Address of Provider	Tax Id or SS Number of provider	Amount Paid

(9) List **monetary \$ Donations** to Charities below – Proof of all donations is required & if over \$ 250 receipt must be from the charity.

Name of Charity	Amount	Name of Charity	Amount

(10) List **NON-Cash donations** below - (only needed if Total of all donations exceed \$500 value)

Name of Charity	Item(s) donated	Original cost \$	Date donated	Fair Market Value \$

(11) List each **Unreimbursed Job-related expense** below- (Teachers include unreimbursed Classroom Supplies)

EXPENSE	COST	EXPENSE	COST

(18) List all **Estimated Tax Payments made:**

FEDERAL (IRS) Payments

Date	Amount Paid						

STATE [] Payments

Date	Amount Paid						

➤ IF you are due a Tax Refund and would like your refund Directly Deposited to your bank account complete the information below:

> **Name of Bank** _____ **Type of Account** [] Checking [] Savings

> **Routing #** _____ **Account #** _____

> **Other Changes / Additional information:**
